



CDTFA
CALIFORNIA DEPARTMENT OF
TAX AND FEE ADMINISTRATION

Strategic Plan

2018-2020



MISSION

We make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.

CORE PRINCIPLES

Being **SMART** about how we achieve our mission.
SERVING taxpayers so that they can comply with their responsibilities.
SUPPORTING one another as we work together to meet our goals.

SMART

- We are building the nation's most effective revenue department. By streamlining our processes and harnessing new technologies, we will do our jobs more effectively and adapt to meet the challenges of the modern marketplace.
- We stress innovative problem solving in everything we do. While recognizing that the old way may still be best, we never stop looking for a better way.

SERVICE-ORIENTED

- We know that taxes can be complicated, and we are here to help. We are committed to being fair, accessible, and transparent.
- We recognize that fulfilling our responsibilities to the public requires quality service, communication, and respect. Our experience shows that when we serve our taxpayers well, our success follows.

SUPPORT OUR TEAM

- We are only as strong as our people. To attract and retain the best workforce, we recognize excellence, support our colleagues, act ethically, and provide team members the professional development necessary to succeed and grow.
- Integrity and honesty are the heart of our organization. We aim to maintain high ethical standards in everything we do.

STRATEGIC PLAN GOALS

GOAL 1

Modernize Tax Collections to Adapt to the 21st Century Economy

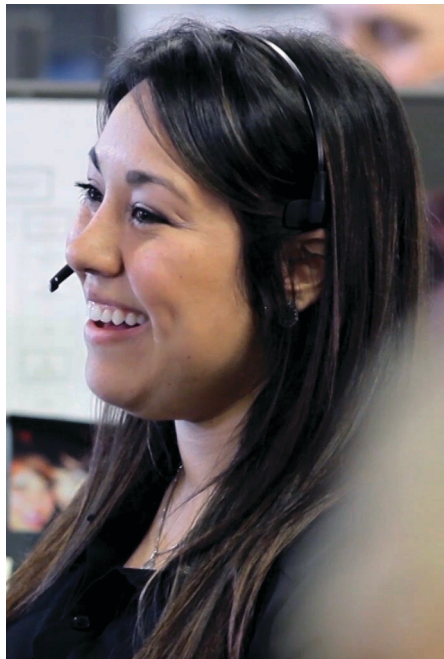
- A. Streamline processes and harness state-of-the-art technologies (for example, Centralized Revenue Opportunity System) to enhance tax collection, improve accuracy, boost efficiency, and speed tax administration.
- B. Adapt to meet the challenges of a changing economy, including online sales, cannabis legalization, and point of sale technologies.
- C. Create a culture of continuous improvement with proper internal controls.
- D. Use data to assess staffing levels, organizational structure, and performance measures.



GOAL 2

Improve Taxpayer Services

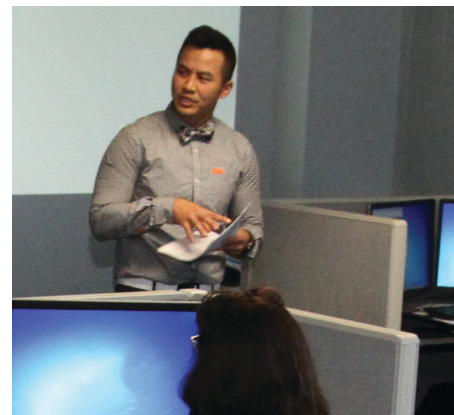
- A. Expand online service for taxpayers.
- B. Increase outreach, communication, and education efforts.
- C. Minimize taxpayer burden and increase compliance.



GOAL 3

Support Our Team

- A. Improve recruitment, selection, and onboarding to ensure team members have the skills necessary to carry out our mission.
- B. Create a workplace culture where all team members feel valued, and are able to contribute their full talents.
- C. Develop CDTFA team members by providing high-impact training, valued mentoring, and knowledge transfer – all essential to succession planning.
- D. Promote and sustain an ethical workplace culture.



ABOUT CDTFA



The California Department of Tax and Fee Administration (CDTFA) administers California's sales and use, fuel, tobacco, alcohol, and cannabis taxes, as well as a variety of other taxes and fees that fund specific state programs. CDTFA-administered programs account for over 25 percent of all state revenue. California's essential services, such as public safety, transportation, health, libraries, schools, social services, and natural resource management programs, are directly supported by these taxes and fees.

Tax programs administered by the CDTFA are concentrated in two general areas – sales and use tax, and special taxes and fees.

To best serve our taxpayers, the CDTFA has offices throughout the state along with offices located in New York, Chicago, and Houston. While the CDTFA team is spread out geographically, we are united in working together to accomplish our mission.